

**Monthly Report to the Special Trustee  
Office of Trust Records  
February 2001**

**Following are highlights of records management activities performed by the Office of Trust Records during February 2001.**

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**STAFFING**

- ❖ **Management Analyst positions** (research, develop, and implement records management policies, retention schedules; training curricula and aids, etc.)
  - One supervisory position to be advertised—recruitment action on this position has been delayed as a result of the current hiring freeze imposed by the new Administration—request for an exception has been submitted
  - Position in Electronic Records was offered and accepted on 2/26/01; will report on March 12
- ❖ **Records Management Specialist positions** (implement records management program, BIA disposition backlog, records cleanup, etc.)
  - Arrival date of new specialist delayed—on board date is March
  - One supervisory position to be advertised—recruitment action on this position has been delayed as a result of the current hiring freeze imposed by the new Administration—request for an exception has been submitted
- ❖ **Archives Technicians positions** (search for refiled or interfiled records; receive, move, inventory, and shelve records)
  - Selection for one vacant position delayed by the current hiring freeze imposed by the new Administration—offer to applicant to be made early March
- ❖ **Computer Specialist positions** (analyze, develop, and implement information technology solutions; manage projects to implement electronic records programs for BIA and OST)—these positions are now subject of the current hiring freeze
  - One vacant 5/7/9 position currently advertised
  - One vacant 9/11/12 position to be advertised
  - One supervisory position to be classified and advertised

**TRAINING**

- ❖ **BIA:**
  - Presented mid-level management records awareness briefings to employees at the following locations
    - Yuma Agency—4 employees
    - Colorado River Agency—18 employees

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**CONTRACTORS**

- ❖ **Iron Mountain Records Management Services** – prepared records for local storage or transfer to Federal Records Center
  - IARM (Hawkins)—180 boxes
  - Northwest Regional Office—1200 boxes transferred to contractor facility
  - Yuma Agency— 135 boxes transferred to contractor facility
  - Colorado River—320 boxes transferred to contractor facility
- ❖ **G&G Advertising**—no activity this month
- ❖ **Bradson Corporation**—vital records workshop held February 13; plan submitted February 28
- ❖ **Native American Industrial Distributors**—on going assistance provided with project management

**OTHER WORK (see attached internal-use chart—working copy)**

- ❖ **Disposition Backlog at BIA Locations**
  - Worked with BIA locations to transfer records to Federal Records Centers or National Archives
    - Congressional Affairs (Wash DC)—10 boxes
    - Southern Pueblos Agency—73 boxes
    - Northwest Region—123 boxes
  - Onsite visit to the following BIA locations to pick up records to send to the contractor facility for boxing, inventorying, and transferring to a Federal Records Center
    - Northwest Regional Office—1200 boxes
    - Yuma Agency— 135 boxes
    - Colorado River Agency— 262 boxes
  - Onsite technical assistance provided to the following BIA location (assistance provided in January-not included in January report)
    - Seminole Agency— 98 boxes of records prepared for shipment to Lee's Summit Federal Records Center for detailed inventorying
  - IARM and contractor staff provided Navajo Regional Office management a presentation on contractor services available to box, inventory, and transfer records to a Federal Records Center
- ❖ **Analyze Records Storage Requirements**
  - Completed assessments of current records storage requirements, inactive records disposition backlogs, and records transfer to appropriate storage facilities
    - Northwest Regional Office— report attached

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- Southwest Regional Office— report attached
- Yuma Agency— report attached
- Colorado River Agency— report attached
  
- ❖ **Develop and Issue BIA/OST Records Manuals, Training Aids and Provide Technical Assistance**
  - Continued work with contractor on technical leaflets
  - Provided ongoing technical assistance to BIA regional and agency offices
  
- ❖ **Replace Historical Records With Working Copies**
  - Follow-up made with Colville Agency to determine the status of their file cleanup activities that need to take place prior to actually starting the pilot
  - Ongoing discussions held with Miami Agency to identify alternatives to their proposed imaging initiative
  
- ❖ **Complete Plan to Comply with Electronic Records Requirement**
  - Purchase order to Millican & Associates was issued on 2/28/01 for Electronic Records Management Program Assistance
    - Work to begin on March 19
    - Deliverables include Electronic Records Policy, analysis of current status and a plan for improvement for OST
  
- Complete Submission of Records Control Schedules to NARA**
  - IARM staff visited the following BIA locations to inventory BIA records for use in schedule development
    - Anadarko Agency
    - Southern Plains Regional Office
    - Energy and Minerals
    - Geographic Data Service Center
    - Northwest Regional Office
    - Yuma Agency
    - Colorado River Agency
    - Southwest Regional Office
    - Spokane Agency
    - Colville Agency
    - Southern Ute Agency
  - Input data received from survey and assessment work sheets into database
  
- ❖ **Conduct Cyclic Evaluations of Records Programs**
  - Completed a records program evaluation at the following BIA location

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- Northwest Regional Office
- Southwest Regional Office
- Colorado River Agency
- Yuma Agency

❖ **Establish Life Cycle Database (Inventory) for Trust Records**

- Concentrated on providing Iron Mountain, who is doing inventories for OTR, a standardized way to enter inventory data; developed a MS-Access database to use for data collection--steps included:
  - Develop prototype database Completed 1/25
  - Meet with Iron Mountain and OST Staff to Demo Completed 2/02
  - Accept Comments and Requests for Changes Completed 2/06
  - Database complete for Hawkins Completed 2/12
  - Database complete for IM Albuquerque Completed 2/26
  - Database complete for IM Portland Completed 2/26
  - Installation at Hawkins, Iron Mountain Portland and Iron Mountain Albuquerque Due mid March
- Original plans to install Hawkins and IM Albuquerque in February were delayed because Iron Mountain hardware (PC's) would not support the software; they will use OTR hardware to enter inventories; effort will facilitate consolidation of inventories into the Versatile database, eliminate inconsistencies and reduce keying errors
- Developed two databases for Records Management Services
  - One to automate the Assessment form and one to capture the Draft BIA 1998 Records Control Schedule
  - Data will be standardized for use in the "Records Control Schedule" database that is under construction
  - Data will be used in conjunction with the Versatile --record retention schedules can be assigned to the inventory
- Staff from Versatile will be in Albuquerque March 7 & 8 to work on data mapping

❖ **Award New Contract for OST Imaging**

- LATA has requested an equitable adjustment because they assert that unexpected volume of indexing has increased their costs; no action taken by Contracting Office
- LATA produced a test CD that loaded into ARCIS on 2/15/01
- LATA went into production on 2/20/01 at 3000-6000 images scanned per day
- First production CD was reviewed on 2/28/01; the CD did not pass
- LATA is producing copies of images so there is one image for each attribute (index file)

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- LATA is producing copies of images so there is one image for each attribute (index) file
  - Per TREEV this is the only way the utility we are using to load images can work; it increases the number of images up to 5 times
  - Solution is to have TREEV write a custom upload program; we will explore that solution
- LATA received COR's letter outlining status of deliverables still needed; they have produced some and wrote a letter explaining why others were not produced
- ❖ **Establish Pilot Project(s) for Electronic Record Keeping**
  - No activity this month